

SURVEY SAVVY

A Context for Best Practices

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What is a Historical Resources Survey ?

Systematic process for

- ❑ *Gathering information* about a community's historical resources.
- ❑ *Identifying* and
- ❑ *Evaluating* the quantity and quality of historical resources for *land-use planning and other purposes*.



"SURVEY PACKAGE"

- HISTORICAL CONTEXTS
- SURVEY DATA
 - Forms, Maps, Photos
- INVENTORY*
- SURVEY REPORT
- RECOMMENDATIONS



* ALL identified and evaluated resources - An inventory is not a register of designated resources

WHY DO SURVEYS?

- ✓ Identify
- ✓ Evaluate
- ✓ Update*



Surveys are planning tools

*Survey Update Goals

- Consider **significance** within additional contexts
- Evaluate with **current understandings** and methodology
- Fill in gaps in knowledge
- Evaluate **integrity** and **current condition**
- Evaluate as **contributor** to district or neighborhood
- Electronic database - public access

How is survey
information
used?



**Historic
Preservation**

**Zoning
&
Planning**

**Disaster
Planning
&
Response**

**Environmental
Review
Sec 106
CEQA**

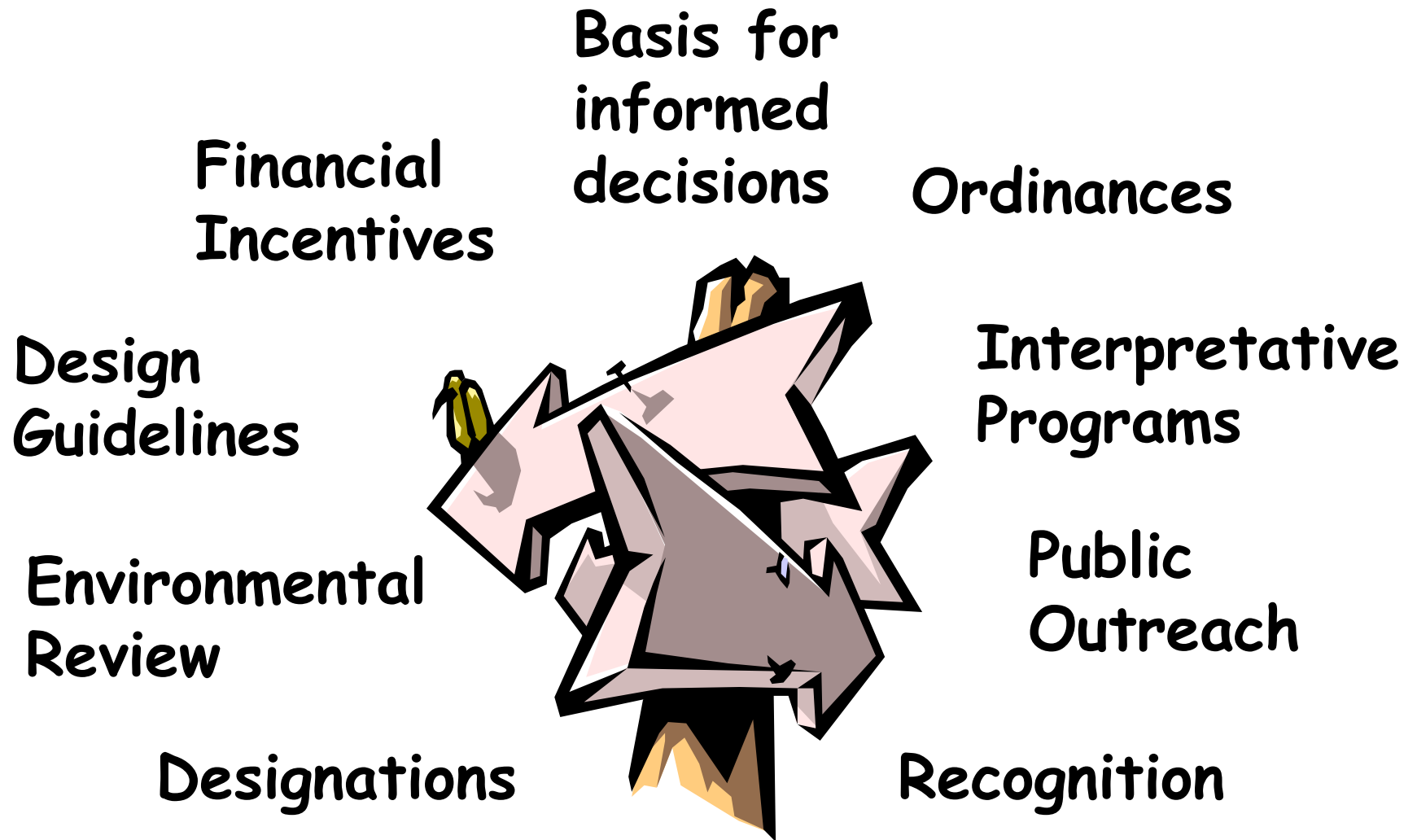
**HOW
Is Survey Data
USED?**

**Transportation
Planning**

**Heritage
Tourism
Initiatives**

**Community
Development**

**Affordable
Housing
&
Adaptive
Reuse**



Provide Direction for Preservation Strategies

What information
do surveys need to
provide?



SURVEYS PROVIDE CLUES

- What resources exist?
- Where are they located?
- Why are they significant?
- What are the character-defining features?
- Do they have integrity?
- How do they need be treated?
- *Revisit, Reevaluate*



What is a historical resource?

- National Register
- California Register
- CEQA
- Local criteria



National Register Criteria

- Buildings, Structures, Objects, Sites, Districts
- Local, State, or National significance
- in American history, architecture, archeology, engineering, and culture

California Register Criteria

- Buildings, Structures, Objects, Sites, Districts, Area, Place, Record, or Manuscript
 - Historically or Archaeologically significant
 - Significant in the architectural, engineering, scientific, economic, agricultural, educational, social, political, military, or cultural annals of California.
- * NO 50 year rule: *...if sufficient time has passed to understand its historical importance*

Local Criteria

City of Redondo Beach Section 10-4.201 (Designation Criteria)

...an historic resource may be designated a landmark, and an area may be designated an historic district pursuant to Article 3 of this chapter, if it meets one or more of the following criteria:

- A. It *exemplifies or reflects* special elements of the City's cultural, social, economic, political, aesthetic, engineering, or architectural history; or
- B. It is *identified with persons or events significant* in local, state or national history; or
- C. It *embodies distinctive characteristics* of a style, type, period, or method of construction, or is a valuable example of the use of indigenous materials or craftsmanship; or
- D. It is representative of the notable work of a builder, designer, or architect; or
- E. ***Its unique location or singular physical characteristic(s) represents an established and familiar visual feature or landmark of a neighborhood, community, or the City.***

CEQA Criteria

- Resource listed in or determined eligible by the SHRC for listing in the **California Register**
- Resource included in a **local register** of historical resources, or
- Resource identified as significant in an **historical resources survey** (status codes 3-5) shall be presumed to be historically or culturally significant
- Any B,S,O,S,A,...which a lead agency determines to be historically significant...

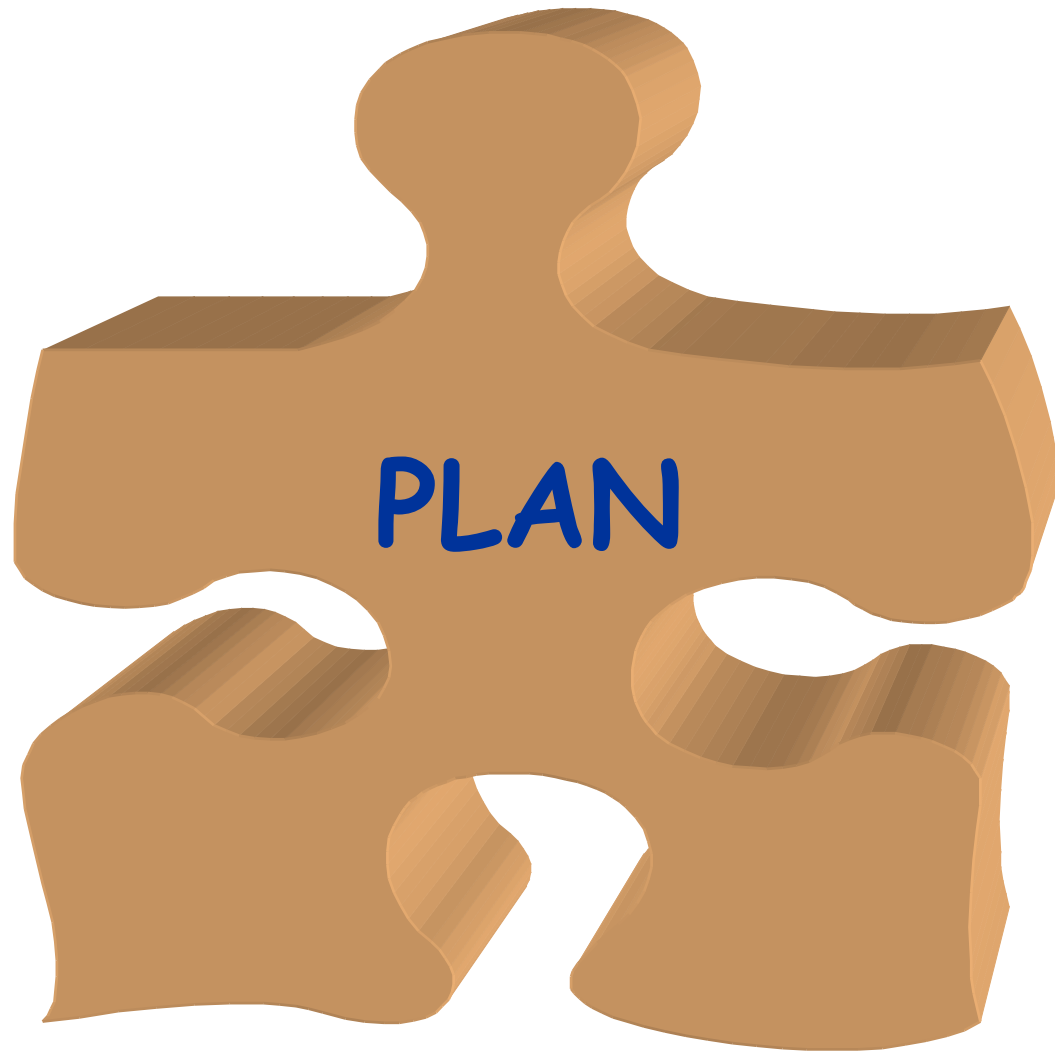


- ✓ National Register
- ✓ California Register
- ✓ Local Criteria

Surveys: A Multi-Purpose Tool

SURVEY TASKS





How do we get started?

- ✓ Funding?
- ✓ Survey goals?
- ✓ Survey what?
- ✓ Survey where?
- ✓ Who will do what?
- ✓ Public Involvement?



Assemble Project Team*

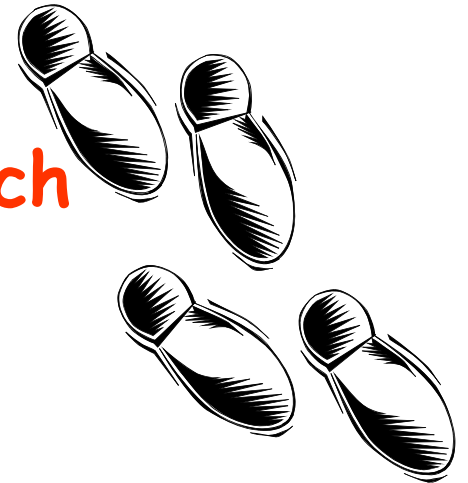


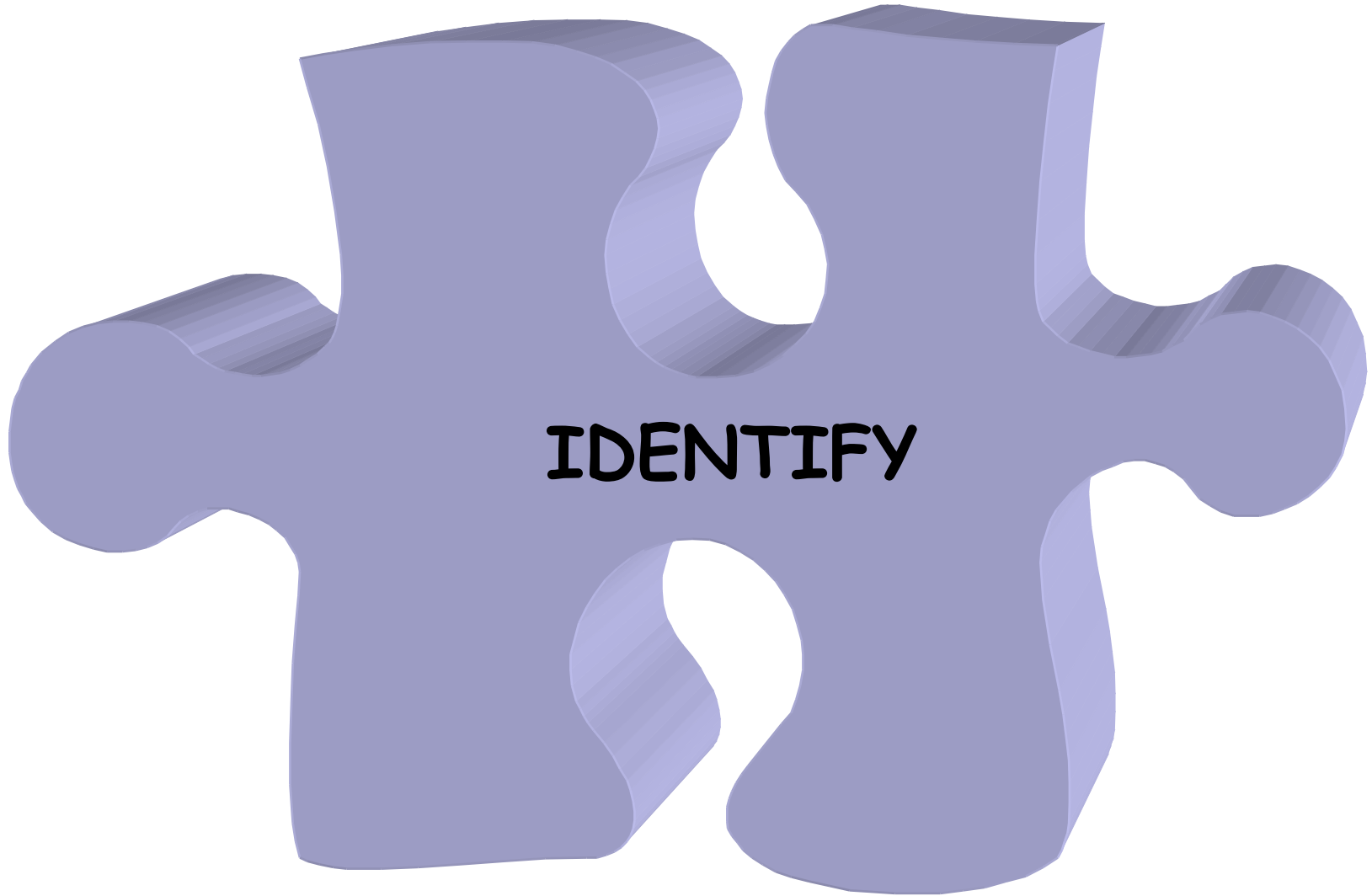
Planning Staff
HP Consultants
Volunteers

* Key team members
should meet
Secretary of the
Interior's
Professional
Qualifications

SURVEY PLANNING

- Develop preliminary historic **context/s**
- Determine **survey boundaries**
- Perform pre-field **archival research**
 - Existing knowledge: maps, reports, building records, photos
 - Windshield survey of project area
- Identify **locations** of properties within period of significance
- Plan field survey **strategies**: style guides, templates, etc.





RECONNAISSANCE

Identify the kinds of historic properties within the survey area

Identify neighborhoods or potential historic districts - concentration of historic resources associated with significant historical patterns, events, or people.

Identify areas where no historic resources are present

Identify potentially significant individual buildings or areas which merit further identification and evaluation

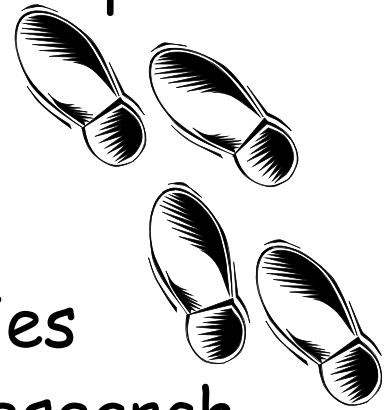
INTENSIVE

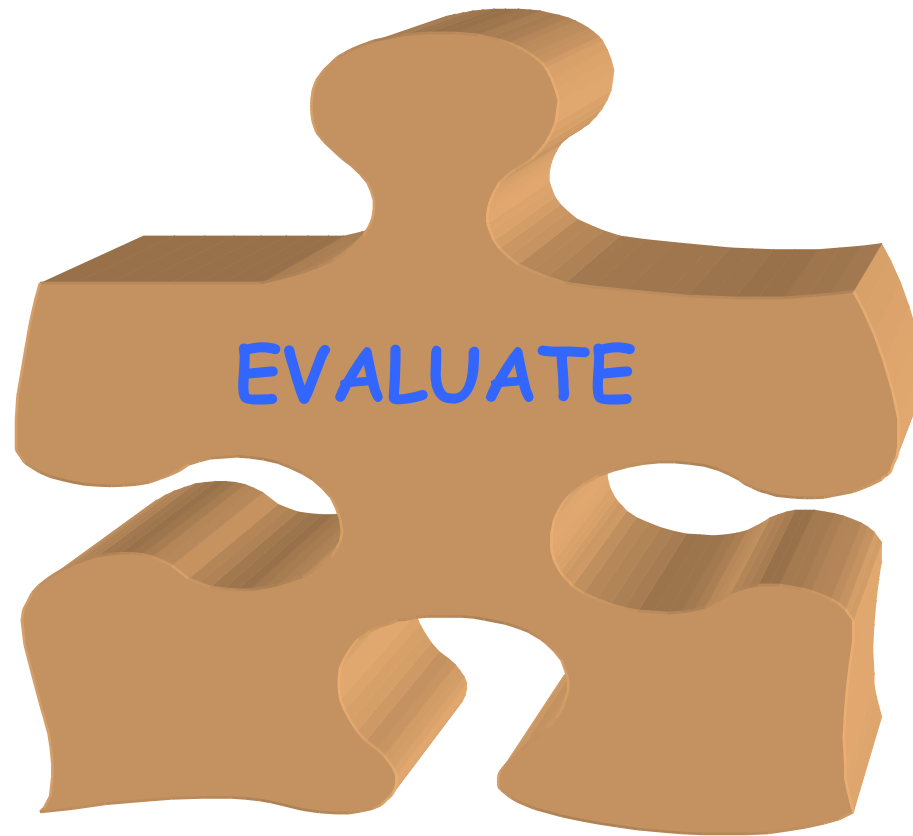
Identify Contributors to Historic Districts & Individually significant Resources

Identify essential physical features (Qualifying Characteristics) that convey the resource's significance, including landscape features, setting or other factors pertinent to resource's integrity.

Identify Properties - Field Survey

- Develop field guide of expected property types and styles
- Photograph buildings and significant landscape features
- Write architectural descriptions - use template for consistency
- Consider potential districts and boundaries
- Identify resources that merit further research or evaluation
- Identify properties that do *not* merit further attention





SIGNIFICANCE
INTEGRITY

EVALUATION

- What **context** and **property type** does the resource represent?
- What is its **significance** in the historical context?
- What evaluation **criteria** are applicable?
- Does it have the expected **features or characteristics** for its type?
- Is it a **contributor** to a **district**?
- Does the property possess the **integrity** characteristics for its property type within the defined context?



SIGNIFICANCE

- The property is associated with or has:
 - Significant historic events or patterns of development
 - important person/s
 - distinctive physical characteristics
 - information potential

Must have the characteristics needed to represent its property type within its context

INTEGRITY

- The resource retains sufficient historic fabric and character-defining features to convey its historic identity
- The resource would be easily recognizable by someone who knew the resource during its period of significance.
- Note: Multiple contexts/multiple periods of significance...
- 7 aspects of integrity – which are vital depends on why the resource is significant

INFORMATION NEEDED TO EVALUATE PROPERTIES

- Adequately developed historic contexts, including identified property types
- Sufficient information about the appearance, condition and associative values of the property to
 - Classify property type
 - Compare its features or characteristics with those expected for its property type
 - Define boundaries and location of property
 - Assess Integrity
 - Assign Status Code

Evaluating Significance & Integrity

- "Historic properties either retain their integrity or they do not" (National Register Bulletin 15)
- Critical relationship exists between significance and integrity
- Integrity is contingent upon significance; the integrity of a given property cannot be evaluated until its significance has been determined
- It is possible for a property to be significant under more than one of the National Register criteria, but to retain integrity only under one.

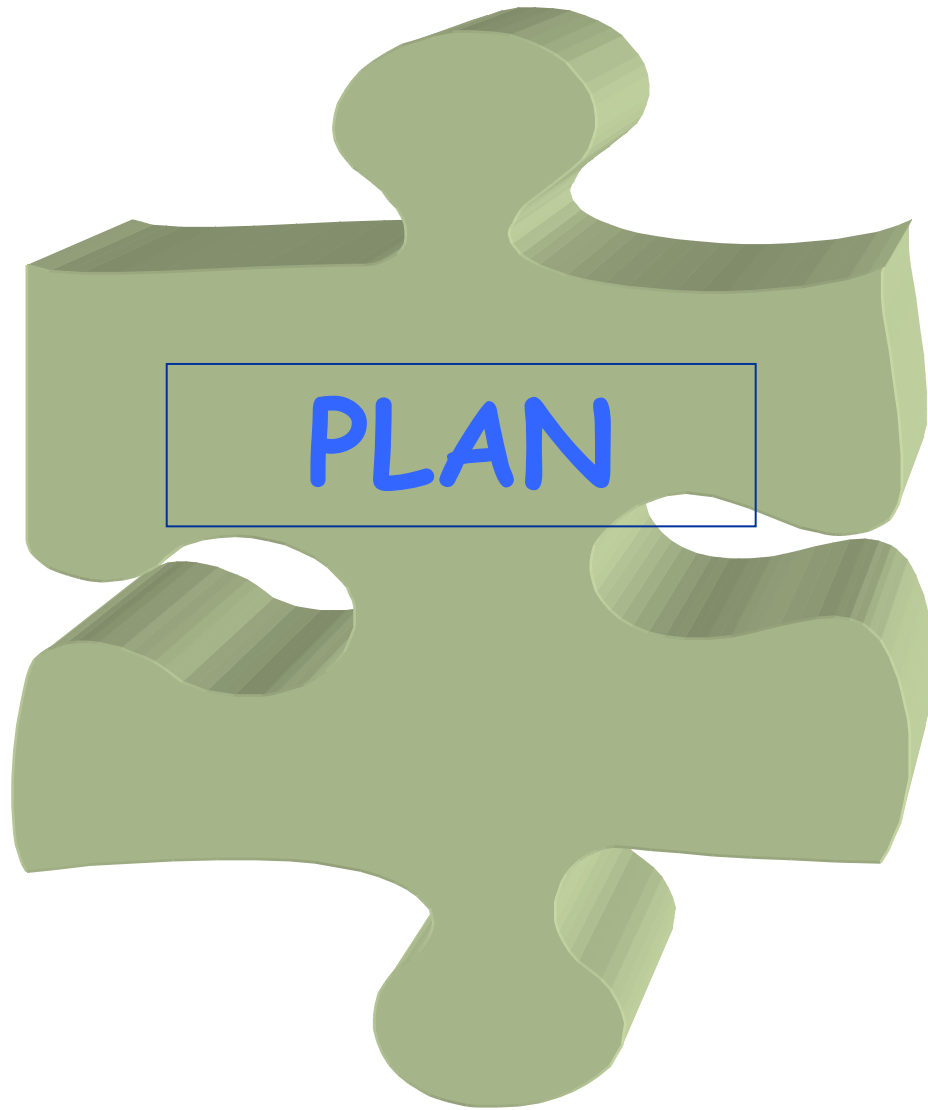


HISTORIC
CONTEXTS

SIGNIFICANCE
EVALUATIONS
INTEGRITY

Context- Based Surveys

- When the context identifies the criteria for significance and establishes integrity thresholds, enough information may be available to make a determination for land-use planning purposes.
- When there is sufficient information available to make a defensible evaluation of significance for land use and project planning purposes, it is appropriate assign a status code.
- *Planning is different than designation*



GOALS OF PRESERVATION PLANNING



- Identify
- Evaluate
- Register
- Treat

The full range of properties
representing each context

HISTORIC RESOURCE?



HISTORIC RESOURCE?



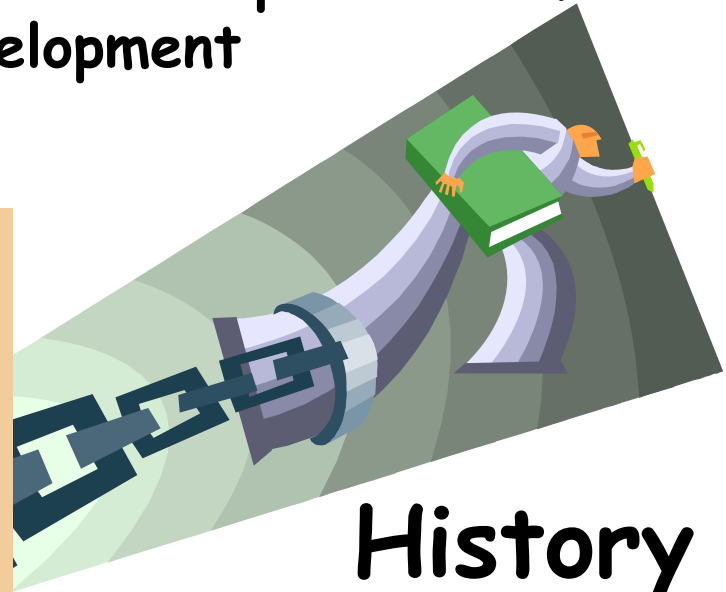
HISTORIC RESOURCE?



HISTORIC CONTEXTS

Describe significant aspects and broad patterns of an area's history and cultural development

Built Environment



History

Patterns

Events

People

Values

HISTORIC CONTEXTS

THEME

PLACE

TIME

HISTORIC CONTEXTS

- Thematic Approach:

- Economic, Political, Social History
- Person or groups that influence character of area
- Architectural styles, building types, materials, methods of construction

- Geographic Approach

- Nation, State, Region, City, Community, Neighborhood

- Chronological Approach:

- Prehistoric or Historic period
-

Historic Contexts

- *Synthesize* information about significant historical patterns, events, people, groups, and values
- *Identify* the properties types* and locational patterns which represent important historic patterns, events, people or groups
- *Identify* characteristics each property type needs to represent the property type within the context
- *Establish* eligibility and integrity thresholds
- *Facilitate* better understanding of relative importance of resources for initial study as well as planning purposes

*Groupings of individual properties based on shared physical or associative characteristics

Historic Contexts also

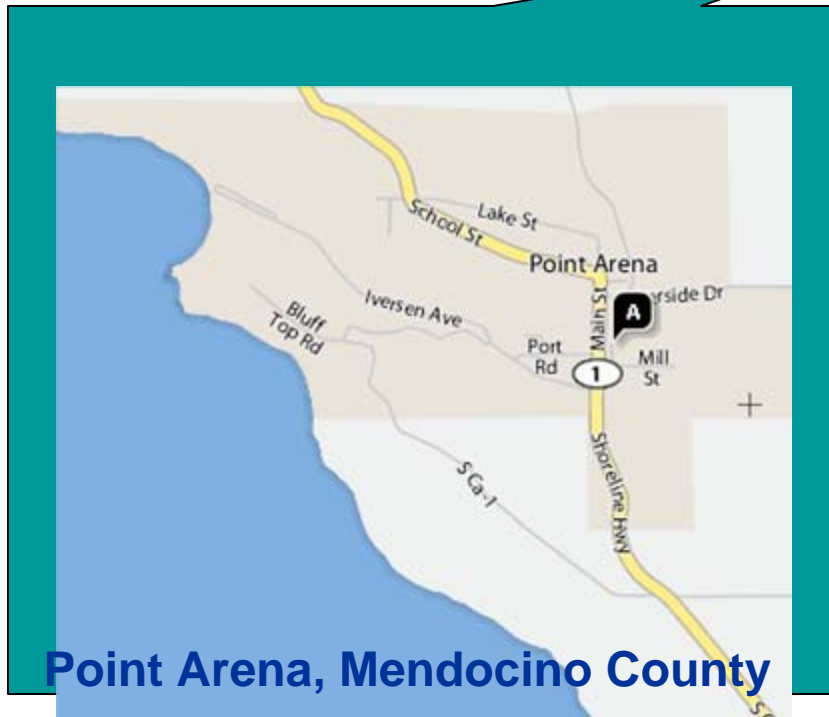
- *Identify* additional Information Needs
- *Recommend* Goals and Strategies
- *Evolve* as additional information is acquired
- *Permit* development of plans for identification, evaluation, and treatment of resources even in absence of complete knowledge of individual properties.

CONTEXTS

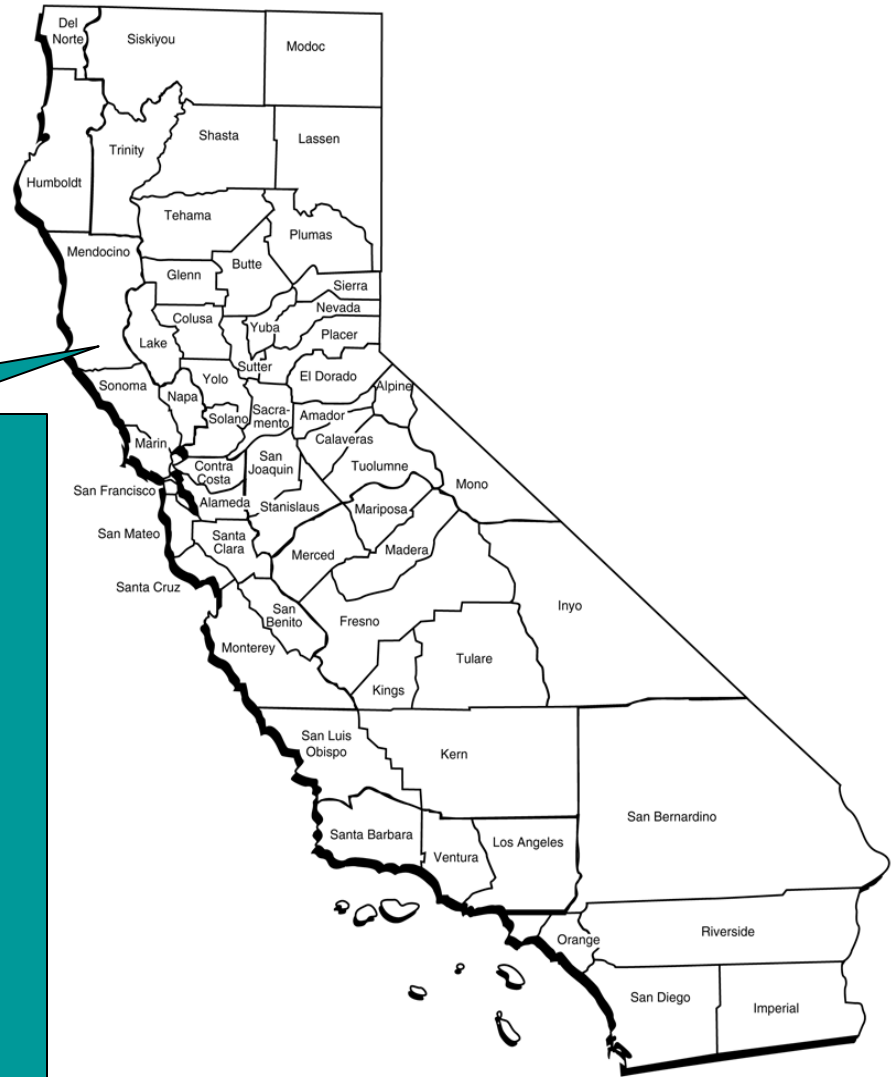


For decisions about identification, evaluation,
registration and treatment of historic properties

Architectural and Historic Resources of Point Arena, CA



Point Arena, Mendocino County



Architectural and Historic Resources of Point Arena, CA

Associated Historic Contexts:

- Economic Development of Point Arena, 1859-1940
- Residential Building in Point Arena, 1859-1940
- Institutions in Point Arena, 1859-1940



Economic Development of Point Arena, 1859-1940

Associated Property Types

- ❑ Commercial buildings of Main Street
- ❑ Wharf buildings -
 - Lifesaving Service
 - Shipping Business
- ❑ Lighthouse complex



Residential Buildings in Point Arena, 1859-1940

Associated Property Types

- Houses – Period of Settlement
 - ❑ Constructed between 1859-1880
 - ❑ Wood, gabled roofs, board siding, large lots
 - Residential Buildings – Period of Stability
 - ❑ Constructed between 1880-1940
 - ❑ Architectural style, skilled craftsmanship, somewhat smaller lots, outbuildings
-

Residential Buildings in Point Arena, 1859-1940

Houses – Period of Stability 1880-1940

Registration requirements:



- Clear examples of domestic architecture of the period
- Retain original form, room sized-additions only in the rear
- Replacement of materials must be in kind and only have minor alterations that do not impact the historic character

Institutions in Point Arena, 1859-1940

- Government
- Schools
- Churches
- Social & Civic Groups



CONTEXTS



For decisions about identification, evaluation,
registration and treatment of historic properties

For More Information:

- "Guidelines for Local Surveys: A Basis for Preservation Planning," *National Register Bulletin 24*,
<http://www.cr.nps.gov/nr/publications/bulletins/nrb24/>
- Archeology and Historic Preservation: *Secretary of the Interior's Standards and Guidelines* http://www.cr.nps.gov/local-law/arch_stnds_0.htm
- National Register Bulletins - 15, 16b
- Office of Historic Preservation www.ohp.parks.ca.gov

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